CITY OF HAYWARD
AGENDA REPORT

AGENDA DATE 02/27/01
AGENDA ITEM _____
WORK SESSION ITEM WS#2

TO: Mayor, City Council, Planning Commission

FROM: Director of Community and Economic Development

SUBJECT: The New Economy and the Transformation of the Industrial Corridor

RECOMMENDATION:

It is recommended that the City Council and Planning Commission review and comment on this report.

DISCUSSION:

The purpose of this report is to stimulate discussion about re-evaluating existing policies for the Industrial Corridor in light of the emergence of the "new economy". The emergence of the new economy is helping to shape the significant changes taking place in the industrial areas around the western and southern edges of the city (see Attachment A). Indeed, this transformation suggests that perhaps a new name may be appropriate for the Industrial Corridor. The following discussion provides a brief overview of the economic outlook for the Bay Area, summarizes employment forecasts and development trends in Hayward, and identifies opportunities and constraints that may impact the shift in emphasis from manufacturing and distribution to more research and development oriented businesses in the Industrial Corridor. With this foundation, potential strategies can be suggested for further exploration with regard to the extent of the city's role in the transformation of the Industrial Corridor.

Economic Outlook and Development Trends

The term "new economy" generally refers to the transformation of our manufacturing-based economy to an information-based economy. This transition is reflected in the growth in employment in certain job sectors. A recent report issued by the Bay Area Economic Forum, *Leading the Transition to a Knowledge-Based Economy,* focused on those industry clusters that drive innovation, economic growth, and job generation in the region. An industry cluster is a group of businesses that tend to locate and grow in close relation to one another. By examining these clusters, researchers can anticipate growth and contractions in a regional economy. In 1995, more than 480,000 people in the Bay Area were employed in one of seven knowledge-based industry clusters. These include the computer and electronics industry, telecommunications, multimedia, movie/TV production, biotechnology, environmental technology, and travel and tourism. The existing distribution of these types of "new economy" companies in the East Bay, as reported in *East Bay Indicators - 2000* prepared by Monroe

Consulting, Inc., is shown as Attachment B. The number of Bay Area jobs in these clusters is projected to grow by 59 percent between 1995 and 2020, as compared to 45 percent for all jobs in the region. The computer cluster alone will add more than 70,000 jobs ranging from high-wage engineering jobs to low-wage stockroom clerks. By 2020, the Bay Area's knowledge-based clusters will employ approximately 770,000 people, or about 18 percent of the region's workforce.

According to the Association of Bay Area Governments (ABAG), the Bay Area job outlook is undergoing a transformation that is significant in both types of jobs available and their location. The Bay Area is moving away from the perception of the regional economy being based only on high-tech manufacturing jobs based in Silicon Valley, to the reality of a much more broadly-based economy that will see growth in an array of job sectors offering employment throughout the Bay Area. While there will be appreciable job growth in the South Bay between 2000 and 2020, many other subregions will see strong growth as well. If Hayward is to share in this growth, policies must be developed to accommodate the anticipated growth in a manner that will be of the greatest benefit to the city. Strategies for providing the necessary infrastructure must also be pursued.

Regional Employment Forecasts

ABAG's most recent forecasts of employment are contained in its *Projections 2000* report. According to ABAG, job growth should slow somewhat through the year 2001 as state and regional economies experience a period of adjustment. Beyond the next few years, the rate of job growth is expected to increase steadily by 2010, and then remain relatively stable through 2020. Projections for the Hayward area generally reflect trends and expectations for the region as a whole. Assumptions regarding the supply and availability of land are consistent with local information and policies of the General Plan.

The table on the following page shows the projected increment in job demand for the Bay Area, Alameda County and the City of Hayward. The total job gain for the 20-year horizon period for the Bay Area is almost one million new jobs. The largest Bay Area growth sector is anticipated to be in the Services sector, with over 52% of the total job growth. It should be noted that the Services category includes business services, which encompass computer software firms, internet service providers, and related high technology services. Computer hardware manufacturing is included in the Manufacturing sector. The three remaining sectors are Manufacturing/Wholesale (19 percent), Retail (11 percent), and Other (19 percent). In terms of growth at the county level, Alameda County is expected to capture 23 percent of the total Bay Area growth with nearly 220,000 new jobs. In the Manufacturing/Wholesale sector, County growth will comprise about 22 percent of the total growth within the Bay Area. The County Service sector growth represents 21 percent of Bay Area growth. This sector represents the largest amount of net new jobs, almost 110,000. Overall, Hayward should account for 8 percent of the total job growth within Alameda County with almost 22,000 new jobs to be created by the year 2020.

Change in Job Demand: 2000-2020 *(Note: All numbers are in addition to existing jobs)*

Sector	Bay Area	Alameda County	% of Bay Area Job Growth	Hayward	% of County Job Growth
Manf/Whls	186,660	40,740	22%	5,220	13%
Retail	105,820	23,000	22%	650	3%
Services	521,400	109,980	21%	13,950	13%
Other	186,710	46,010	25%	2,040	4%
Totals	1,000,590	219,730	23%	21,860	8%

Source: ABAG *Projections 2000*

Hayward Employment Trends

According to the ABAG, total employment in Hayward was 90,080 in 2000, with 43,696 (48%) of these jobs located in the Industrial Corridor (see Attachment C). Total employment in the city increased 18% over the 76,440 jobs in 1990, while employment in the Industrial Corridor increased 32% above the 33,041 jobs in 1990. The Industrial Corridor accounted for 43% of the total employment in 1990. Employment was relatively stable in the early 1990's, even while significant job losses were occurring elsewhere in the Bay Area due to military base closures and the California recession, because of Hayward's diversified industrial base. Employment growth during the latter part of the decade can be attributed to the economic resurgence at the regional, state and national levels. According to ABAG, employment in the Hayward area is expected to increase by almost 22,000 (24%) over the next twenty years, with an increase of 12,673 jobs (29%) anticipated in the Industrial Corridor. If these forecasts are realized, the Industrial Corridor would account for 58% of the growth in jobs, increasing its share of total employment within the city to 50%.

Development Trends in the Industrial Corridor

The Industrial Corridor comprises over 3,500 acres of land along the western and southern edges of the city (see Attachment D). Due to the size and extent of the Industrial Corridor, land use data are presented for three subareas. The western portion consists of the area north of Route 92; the southwestern portion is the area between Route 92 and I-880; and the southern portion includes the area east of I-880. Approximately 2,500 acres are currently devoted to industrial uses, including the industrial park on leased land at the Hayward Executive Airport and the South Hayward BART maintenance yards. Another 600 acres are presently devoted to commercial, residential, or public and quasi-public uses, including the Hayward Executive Airport and other public utility facilities. About 400 acres are classified as vacant land. It should be noted that some of this land may not be suitable for industrial development.

A significant portion of the land already devoted to industrial uses may see a change to more intensive land uses based on current development trends. The 1,400 acres now occupied by warehouses or other marginal uses may be candidates for conversion or redevelopment as office or research and development space. In addition, the approximately 200 acres consumed by land-intensive uses such as wrecking yards, wholesale auto auction businesses, and trucking terminals are considered underutilized and appropriate for more intensive development. This trend toward more intensive development will result in higher employee densities, the implications of which are discussed later in this report.

The surge in employment growth is reflected in the dramatic increase in non-residential construction activity in recent years. Based on building permits issued, the amount of new commercial and industrial space built annually in Hayward increased from .58 million square feet in 1995 to 1.1 million square feet in 1997 and 1.2 million square feet in 1998. Consistent with regional trends, construction activity declined in 1999 as building permits were issued for approximately .87 million square feet. A further decline in activity was apparent in 2000 as applications were approved or pending for about .46 million square feet. According to data supplied by BT Commercial, Hayward currently has a total of 45,604,072 square feet of warehouse, manufacturing, and research and development building space. This includes 22,546,478 square feet of warehouse space, 17,744,141 square feet of manufacturing facilities, and 5,313,453 square feet of research and development space.

Data supplied by BT Commercial on a quarterly basis provide information on market absorption rates in the warehouse, manufacturing, and research and development sectors in Hayward and other East Bay cities. The following assessment is a summary of their report for the second quarter of 2000. This summary suggests that Hayward will continue to see a strong demand for warehouse space even as the city seeks more light manufacturing and research and development companies.

Warehouse. The warehouse market remained very tight in the East Bay during the first half of 2000. Over the previous two years, warehouse vacancy in the East Bay has been very stable within the 3%-6% range. Quality space in the East Bay has been increasingly difficult to secure and this trend should continue in the foreseeable future. The combination of low vacancy and strong demand throughout the Bay Area will force tenants located in the higher-priced Peninsula and South Bay regions to expand their geographic search areas. In comparison, the more reasonable pricing in the East Bay warehouse market will continue to attract tenants from the surrounding markets.

Manufacturing. The East Bay industrial market remained very tight in the first half of 2000 with vacancy stable within the 2%-4% range during the previous two years. The market for quality industrial space remains tight. With vacancy rates hovering slightly above 3% for the entire market and increasing rental rates, competition for industrial space along the I-80/I-880 corridor and throughout the East Bay market will persist.

Research and Development. The first half of 2000 proved to be the most remarkable yet for the East Bay R&D market as records were broken in every way imaginable: lowest vacancy rates, highest ever gross and net absorption, lowest number of listings, and highest average

asking rate. Quality space in the East Bay has been increasingly difficult to secure and this trend should continue in the foreseeable future. The combination of low vacancy and strong demand throughout the Bay Area will force tenants located in the higher-priced Peninsula and South Bay regions to expand their geographic search areas. In comparison, the more reasonable pricing in the East Bay R&D market will continue to attract tenants from the surrounding markets while options for conversion to higher and better uses broaden purchasers location alternatives.

Recent new construction activity, as well as data on conversion activity in terms of the amount of warehouse space changing to office or research and development space, indicates that the trend toward more intensive development is continuing throughout the Industrial Corridor. As a result of this trend, the average employee density is projected to increase over the next 20 years from 17 employees per acre to 19 employees per acre. Employee densities currently range from 11 per acre in the South subarea to over 21 per acre in the West subarea. Although the increment in the overall average employee density throughout the Industrial Corridor appears small, this slight rise represents the equivalent of all new development on the remaining 400 vacant acres occurring at densities of 30 employees per acre. Forecasts of the average employment density may be understated in that the increased emphasis on office and research and development space within the proposed Eden Shores business complex and other recent similar development projects is not fully reflected in the current employment projections prepared by ABAG.

Opportunities and Constraints

The General Plan, in acknowledging the Industrial Corridor as a major change area, recognizes the potential costs in terms of accommodating increased traffic and expanding utility capacities as well as the potential economic benefits in terms of more jobs and increased tax receipts. These concerns, along with other opportunities and constraints that may be encountered in the transformation of the Industrial Corridor, are discussed in the remainder of this report.

Land Use Regulations and Development Standards

Development regulations in the Industrial Corridor essentially presume and encourage a manufacturing-based economy, whereas a new approach may be warranted that better reflects the needs of the information-based economy. This is essential with regard to provisions for business parks and research and development firms. The existing provisions in the Zoning Ordinance may serve to inhibit the development of new office and research and development space as well as conversion of warehousing to this type of space. In addition, provisions in the Off-Street Parking Regulations may inhibit the ability to address parking needs associated with more intensive use of these sites. These and other related concerns are addressed below.

Multiple Zoning Districts. There is only one Industrial zoning district in the city. The Industrial District currently allows office buildings only within business or industrial parks that are 25 acres or greater in size. Although most of the Industrial Corridor is comprised of business and industrial parks, some of these parks are less than 25 acres in size. Also, office buildings cannot exceed 40 feet in height. This height limitation effectively restricts office

buildings to no more than three stories. These requirements are impediments to high-tech and research and development uses. These restrictions were apparently adopted at a time when it was felt that office buildings in the Industrial Corridor would detract from efforts to attract office development in the Downtown area. With the advent of the high-technology campus style of industrial development, such conditions no longer seem appropriate in today's economic environment.

It seems appropriate, therefore, to consider the establishment of multiple zoning districts within the Industrial Corridor to better accommodate the differing needs of new high-tech uses and traditional manufacturing and warehousing uses. For example, a Business Park district could encourage offices as primary uses while requiring a use permit for warehouses or even prohibiting such uses altogether. A Manufacturing district could be structured to accommodate manufacturing facilities as well as research and development operations. A new Warehousing district could respond to the needs of wholesaling and distribution uses.

Integration vs. Separation of Land Uses. The changing economic environment, along with the possible consideration of multiple zoning districts, suggests a need to examine provisions in the zoning ordinance regarding the separation of land uses. On the one hand, many of the businesses that use hazardous materials are located in the Industrial Corridor. For example, high-tech businesses such as computer chip manufacturers and, to a lesser extent, some biotech industries, use highly toxic or corrosive gases. These particular classes of hazardous materials, if not properly stored, handled, and monitored, can pose a threat to the community. The separation of these industrial uses from adjacent residential uses makes it easier for emergency responders to mitigate and evacuate a hazardous situation. On the other hand, as portions of the Industrial Corridor are developed with more intensive uses, the increase in employee densities may result in a need for child-care facilities in closer proximity to the workforce. Such uses currently are prohibited in the Industrial District due to concerns about safety and land use compatibility. Perhaps there are portions of the Industrial Corridor, such as the newer business parks, where these facilities could be located and pose little or no safety risks.

Parking Requirements. Parking issues arise as more intensive development occurs in the Industrial Corridor. Parking requirements for warehouse uses are obviously much less than those for more intensive uses. This situation often inhibits the conversion of warehouse space to office and research and development uses. There are several approaches that might address this problem. Higher parking ratios could be required for all new buildings so as to facilitate conversion at a later date. Or, perhaps an overlay district could be applied to certain areas to address parking issues, including those related to conversion of warehouses to more intensive uses. In addition, it may be desirable to explore with industrial park owners the possibility of allowing on-street employee and visitor parking (no trucks) within some of the business and industrial parks.

Minimum Parcel Size. It may also be appropriate to consider increased minimum parcel sizes for certain types of industrial development. The minimum lot size in the Industrial District is currently 10,000 square feet. However, lots this small are not conducive to manufacturing or

research and development operations. Perhaps the city should consider prohibiting the subdivision of land into parcels of less than one acre.

Redevelopment Areas. Because much of the Industrial Corridor has been developed with business parks, which have been generally well maintained, it is unlikely that conditions are appropriate for the establishment of a redevelopment project area. On the other hand, the lack of some of the tools associated with redevelopment, such as assistance with assembly of parcels, may inhibit desirable development in areas outside the business parks. In addition, the absence of a tax-increment funding source precludes the possibility of more funding for needed improvements.

Annexation of Unincorporated Islands

There are pockets of unincorporated area within and adjacent to the Industrial Corridor that contain parcels that are underutilized or developed with marginal uses. Annexation of these unincorporated islands, located along Depot Road and in the Mt. Eden area, including Dunn Road and Saklan Road, will be necessary to realize the full development potential of these areas. As previously suggested to Council, staff believes it is appropriate to evaluate the merit of annexing these areas into the city.

Circulation Network and Transit Access

Discussions with the Chamber of Commerce have underscored that travel times within the city, and particularly the Industrial Corridor, are just as critical as the time it takes to get to Hayward from other places in the region. There are several opportunities for transportation improvements within the Industrial Corridor.

Industrial Assessment District. Overall funding remains in short supply, and even with the reauthorization of Measure B, funding for local streets and roads will fall behind what is needed. Lack of funding also inhibits implementation of major capital improvement projects that could relieve congestion. In light of the improved economy and resulting higher land values, it seems appropriate to re-initiate the feasibility of establishing an Industrial Assessment District or similar mechanism that would provide a local source of funding for improvements within portions of the Industrial Corridor. The original proposal developed in the 1980s estimated the total cost of improvements at about $60 million; the cost today would be closer to $75 million. Reauthorization of Measure B will help improve access in and out of the Industrial Corridor by providing $19.5 million of the $50 million total cost for the I-880/Route 92 reliever route.

I-880/Route 92 Interchange and Route 92 Widening. Constraints are still present as traffic congestion continues to increase faster than improvements can be made, resulting in worsening congestion that inhibits economic development. In the short-term, lack of progress on the I-880/Route 92 interchange project will result in increased congestion and will be exacerbated by the completion of the Route 92 widening project several years before completion of interchange improvements.

AC Transit Service Study. A study now underway presents an opportunity to improve transit service to the Industrial Corridor. AC Transit is working with local jurisdictions to look at possible improvements in transit service in Central Alameda County. In addition, AC Transit has received a grant from the Metropolitan Transportation Commission to address primarily welfare-to-work needs by establishing links with the two Hayward BART stations. It has also been noted that increases in employee/population densities within the Industrial Corridor suggest the need for greater attention to pedestrian circulation improvements such as crosswalks and related safety concerns such as adequate lighting and crime prevention.

Technology Support

Fiber optic installations are important to continued development of the Industrial Corridor and overall economic competitiveness of the city. Since 1995, staff has been tracking installation of fiber optic conduits throughout the city. The location of existing and proposed routes is shown in Attachment E. Currently, there are seven different companies that have existing or planned routes. Existing routes extend to all parts of the Industrial Corridor, with the heaviest concentration in the West subarea. Two of the existing routes also serve the Downtown area and California State University-Hayward. Other major routes follow the Union Pacific Railroad tracks and the PG&E transmission lines. Major proposed routes would extend along Upper B Street, Mission Boulevard, and West A Street. Funding for some of these installations has come from grants related to traffic signal interconnect programs.

Utility Systems and Capacities

The Industrial Corridor is served by the city's water and sewer systems. Updates of both the Water Distribution and Wastewater Collection Systems Master Plans are currently underway with completion scheduled in July 2001. The update of the Master Plan for the wastewater treatment plant is scheduled for completion in April 2001.

Water Supply. The water system is generally in good condition and does not pose significant concerns in terms of accommodating additional development. Water supply from the Hetch Hetchy system is secured through an agreement with the City and County of San Francisco. An identified project that should be constructed in the next 5 years is a booster pump station on the city's 42" aqueduct on Hesperian Boulevard. Local storage and distribution facilities are adequate, with needed improvements programmed in the Capital Improvement Program. Additional needed improvements may be identified in the Master Plan update currently underway. Local emergency wells and interties with other systems are in place.

Wastewater Treatment. The wastewater collection system is in good condition, with recent improvements completed at the Valle Vista and Tennyson pump stations. Current dry weather capacity of the wastewater treatment plant is about 13 million gallons per day (MGD). About two-thirds of the plant influent's flows is from residential development, while one-third is from institutional, commercial and industrial development. In 1995, the plant was handling daily flows of about 10 MGD. However, since that time, increased water usage by existing residential and non-residential development, new residential development, and new development within the Industrial Corridor, primarily Pepsi and Berkeley Farms, have added

greatly to daily flow volumes. Flows from industrial developments sometimes have very large amounts of biological strengths and solids, and thus place a heavy burden on the treatment process. For example, the biological strength of the daily flow from Berkeley Farms is equivalent to the daily flow from as many as 10,000 residential dwelling units and accounts for about 25% of the total biological load at the plant. Today, the treatment plant is operating virtually at capacity and lacks needed redundancies. Upgrades to the system will be reviewed in the context of the Master Plan.

Fire Protection and Hazardous Materials

The higher standards for fire protection set by nationally recognized organizations have encouraged the construction of many new buildings already equipped with fire protection and alarm systems that meet the needs of high-tech industries. In addition, the high water flows required by these nationally recognized standards and provided by the City water delivery system easily satisfy specifications not only for on-site equipment but also for fire suppression and emergency response equipment. However, older buildings, as well as efforts to convert warehouses to more intensive uses, often pose special problems.

Retrofitting Buildings. A frequent challenge posed to high-tech businesses wanting to locate in pre-existing buildings is the renovation of structures to meet current building and fire code requirements. This is particularly difficult when moving into some of the older multi-tenant warehouse buildings in Hayward, some of which are located in the Industrial Corridor. In addition, there often are issues related to transforming even newer or brand new buildings to meet the specialized needs of high-tech industries. Some of these buildings, originally built as speculative warehouses, could be retrofitted to more intensive uses such as call centers or other 'back office' type uses.

Contaminated Sites. The City keeps track of all facilities in Hayward that handle hazardous materials or generate, store or treat hazardous waste. A review of the list of contaminated sites shows that there are approximately 175 contamination cases within the Industrial Corridor, 74 of which have been closed by the Regional Water Quality Control Board. Of the 101 open cases, 6 are in unincorporated Alameda County areas. The 95 open cases within the city limits consist of 64 underground storage tank cases (UST) and 31 other cases not directly linked to releases from underground storage tank systems. The City, as agents of the Regional Board, is the lead agency in Hayward for UST cases only. Non-UST cases are normally referred to the Regional Board. The 64 UST cases in the Industrial Corridor that are within the city limits include 4 that are within the Hayward Executive Airport property. Twenty-five of these open UST cases are associated with commercial fueling stations and fueling operations for warehousing, distribution, and trucking facilities.

The contamination cases more difficult to investigate, characterize, and remediate are those that involve industrial solvents which affect not only soils but groundwater as well. These solvents travel readily in groundwater over long distances. The California Regional Water Quality Control Board is currently overseeing the investigation and cleanup of these cases in Hayward.

Police and Emergency Response

The transition to more high-tech industries and the development of previously undeveloped lands in the area will likely bring more people into the industrial corridor. The conversion from existing open warehousing operations to high tech industries will increase the population density within buildings. This in turn may spawn additional demand for commercial development that serves the needs of the larger employee population. Generally, a greater population will result in a higher demand for emergency services.

At the present time, population densities generate few calls for police services during the day. Higher levels of service are difficult to justify at night time. Efforts to establish "Commercial Watch" groups similar to the Neighborhood Watch program have met with limited success. Options for providing increased levels of security include possible arrangements for extra security patrols similar to the agreement with Chabot College. In addition, businesses can implement "target hardening" measures such as installation of fencing and increased lighting.

Summary of Concerns and Issues in the Industrial Corridor

Based on the concerns presented in this report, staff is requesting that the City Council and Planning Commission comment on the following issues:

1. Multiple zoning districts (i.e., Business Park, Manufacturing, Warehousing and Distribution) within the Industrial Corridor to better accommodate the differing needs of new high-tech uses and traditional manufacturing and warehousing uses.

2. Issues of integration vs. separation of land uses in the Industrial Corridor.

3. Overlay zoning districts in portions of the Industrial Corridor to address parking issues associated with the conversion of warehouses to more intensive uses.

4. Allowing on-street employee and visitor parking (no trucks) within some of the business and industrial parks.

5. Minimum lot sizes to prohibit the subdivision of land into small parcels (less than one acre).

6. Placing a high priority on increased transit access to and within the Industrial Corridor.

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Recommended by:

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Director of Community and Economic Development

Approved by:

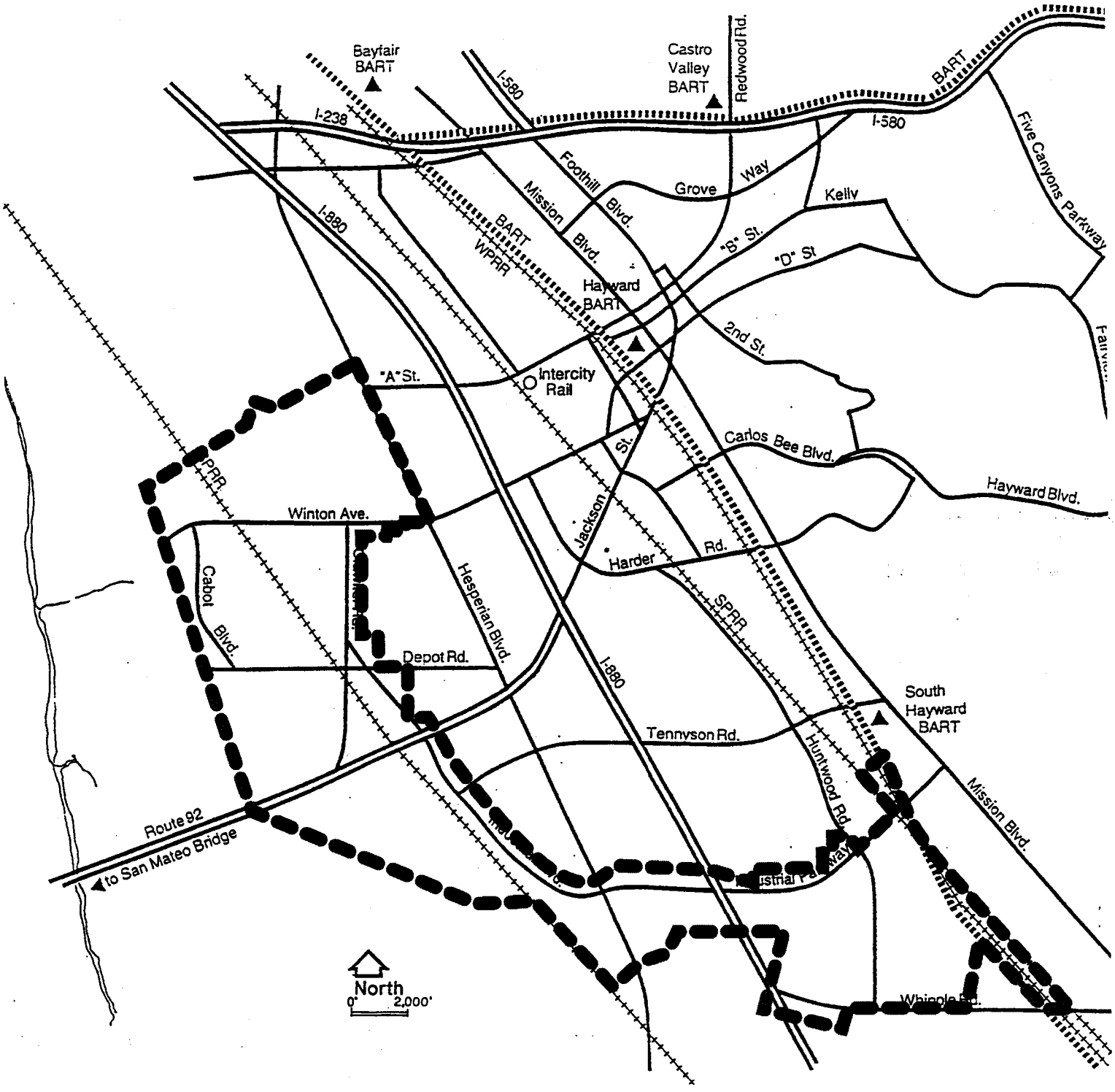
Jesús Armas, City Manager

Attachments:

Exhibit A.	Map of Industrial Corridor
Exhibit B.	Locations of East Bay Software and High-Tech Companies
Exhibit C.	Employment Projections for the Hayward Industrial Corridor
Exhibit D.	Existing Land Use within the Industrial Corridor
Exhibit E.	Map of Fiber Optic Conduits in Hayward

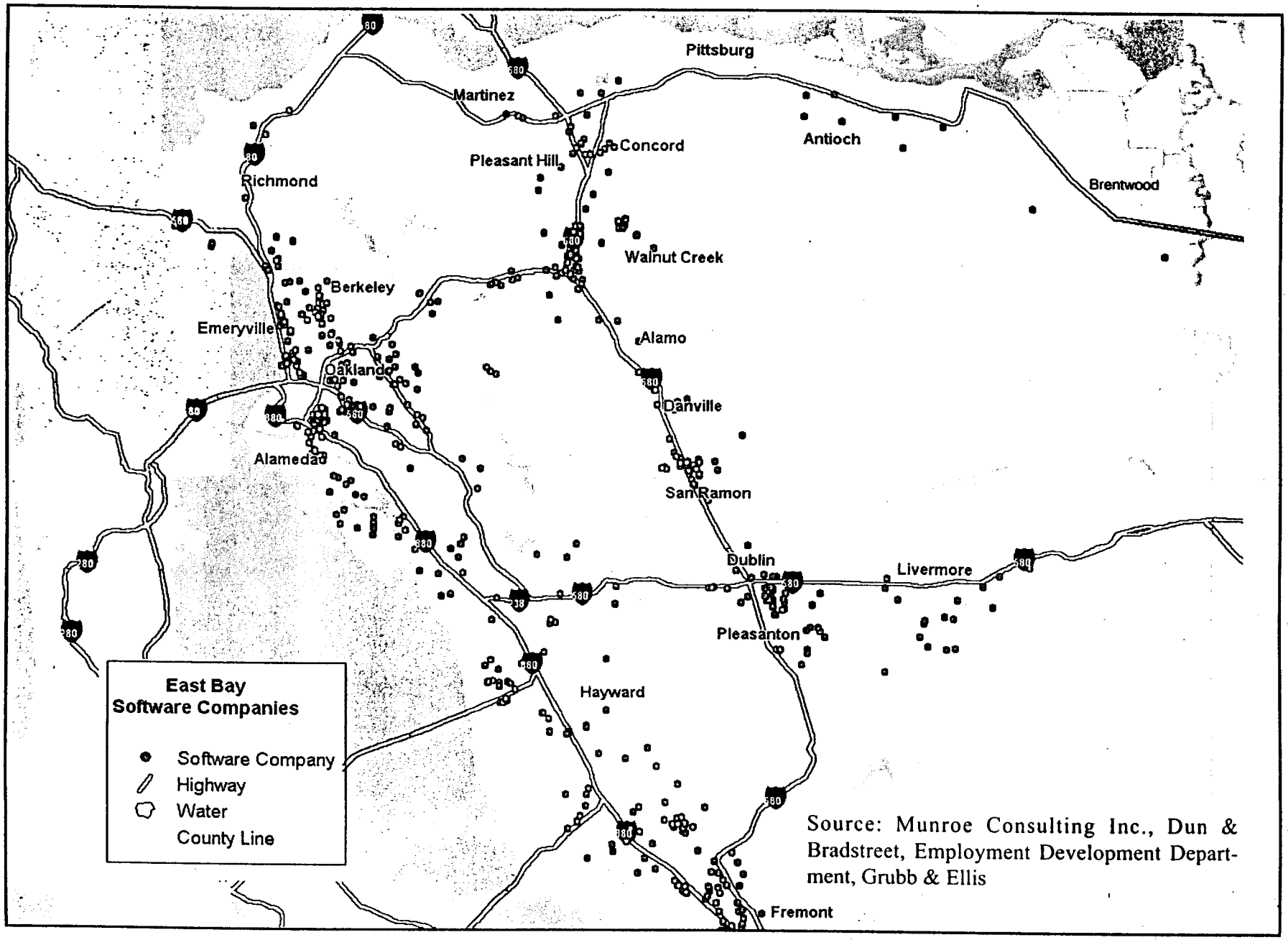
2.23.01

EXHIBIT A



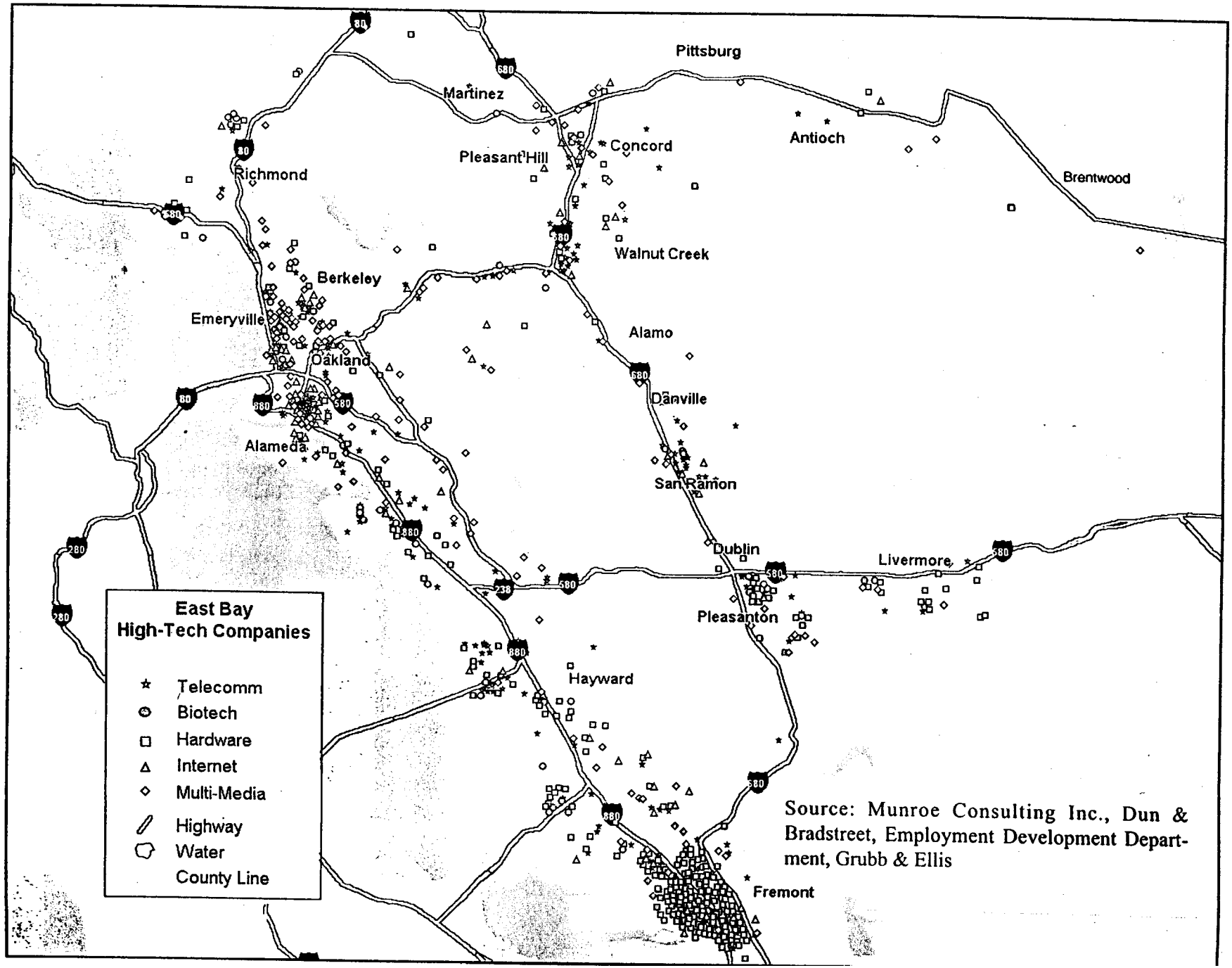
INDUSTRIAL CORRIDOR

Figure 26: Software Companies with 5 or more Employees in the East Bay



Source: Munroe Consulting Inc., Dun & Bradstreet, Employment Development Department, Grubb & Ellis

Figure 27: Internet, Telecommunications, High Technology Manufacturing, and Multimedia Companies with more than 2 employees in the East Bay.



Source: Munroe Consulting Inc., Dun & Bradstreet, Employment Development Department, Grubb & Ellis

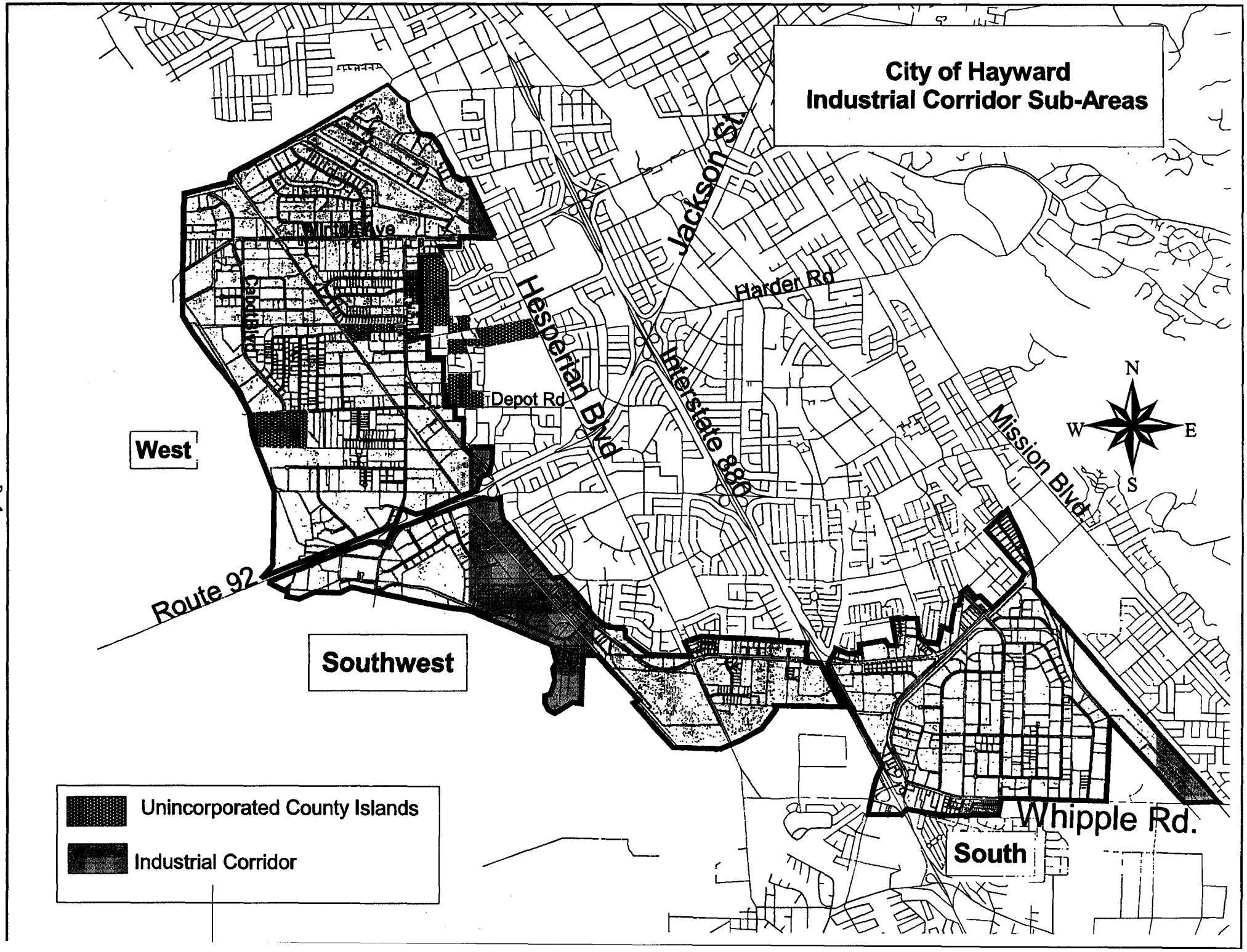
Employment Projections for the Hayward Industrial Corridor by Sub-Area

Industrial Corridor Sub-Area	Manuf 2000	Manuf 2020	Change 2000 to 2020	%	Retail 2000	Retail 2020	Change 2000 to 2020	%	Service 2000	Service 2020	Change 2000 to 2020	%	Other 2000	Other 2020	Change 2000 to 2020	%	Total 2000	Total 2020	Total Change 2000 to 2020	%
West	6,576	7,594	1,018	15%	3,071	3,361	290	9%	6,433	10,350	3,917	61%	12,892	15,120	2,228	17%	28,972	36,425	7,453	26%
Southwest	1,934	2,348	414	21%	966	1,086	120	12%	2,052	3,460	1,408	69%	2,334	3,054	720	31%	7,286	9,948	2,662	37%
South	2,025	2,426	401	20%	280	393	113	40%	1,504	2,630	1,126	75%	3,629	4,547	918	25%	7,438	9,996	2,558	34%
Total	10,535	12,368	1,833	17%	4,317	4,840	523	12%	9,989	16,440	6,451	65%	18,855	22,721	3,866	21%	43,696	56,369	12,673	29%

City of Hayward: February 15th, 2001
Source: Projections 2000

Note: Southwest Area Includes Kaiser Permanente and
West Area Includes Chabot College
These facilities are not located in the Industrial Corridor

EXHIBIT C


City of Hayward
Industrial Corridor Sub-Areas
Winton Ave
Harder Rd
Jackson St.
Hesperian Blvd
Interstate 880
Depot Rd
Mission Blvd.
Route 92
West
Southwest
South
Whipple Rd.
N
W
E
S
Unincorporated County Islands
Industrial Corridor

Existing Land Use by Industrial Corridor Sub-Area (Acres)

Industrial Corridor Sub-Area	Industrial	Commercial	Residential	Public	Vacant Land	Total
West	1,082.3	86.7	16.9	545.2	130.4	**1,861.4**
Southwest	484.8	13.5	10.0	65.6	205.1	**779.0**
South	615.8	97.7	0.4	128.4	70.4	**912.7**
Total	**2,183.0**	**197.8**	**27.3**	**739.2**	**405.9**	**3,553.1**

City of Hayward: February 13, 2001
Source: City of Hayward GIS and Metroscan

Existing Industrial Land Uses by Industrial Corridor Sub-Area (Acres)

Industrial Corridor Sub-Area	Heavy Industrial	Light Industrial	Trucking, Terminals, and Distr.	Warehouse	Wrecking Yard	Misc. Industrial	Total
West	63.4	257.5	12.2	612.8	43.9	92.6	**1082.3**
Southwest	31.6	82.3	63.5	305.9	0.6	1.0	**484.8**
South	40.0	66.5	23.2	474.3	0.0	11.9	**615.8**
Total	**134.9**	**406.2**	**98.9**	**1393.0**	**44.5**	**105.5**	**2183.0**

Existing Commercial Land Use by Industrial Corridor Sub-Area (Acres)

Industrial Corridor Sub-Area	Auto Dealer	Auto Service & Repair	Motels and Restaurants	Office	Retail Store	Misc. Improvements	Total
West	0.0	4.4	1.4	63.9	0.0	16.9	**86.7**
Southwest	0.0	0.0	2.4	4.5	1.0	5.5	**13.5**
South	65.0	2.0	5.2	25.5	0.0	0.0	**97.7**
Total	**65.0**	**6.4**	**9.1**	**93.8**	**1.0**	**22.5**	**197.8**

City of Hayward: February 13, 2001
Source: City of Hayward GIS and Metroscan

Existing Residential Uses by Industrial Corridor Sub-Area (Acres)

Industrial Corridor Sub-Area	Single Family Residence (SFR)	2-4 Units SFR	Multi-family 2 Units	Multi-Family 4 Units	Total
West	13.3	1.6	1.8	0.2	**16.9**
Southwest	6.4	3.4	0.2	0.0	**10.0**
South	0.4	0.0	0.0	0.0	**0.4**
Total	**20.1**	**4.9**	**2.0**	**0.2**	**27.3**

Existing Public & Quasi-Public Uses by Industrial Corridor Sub-Area (Acres)

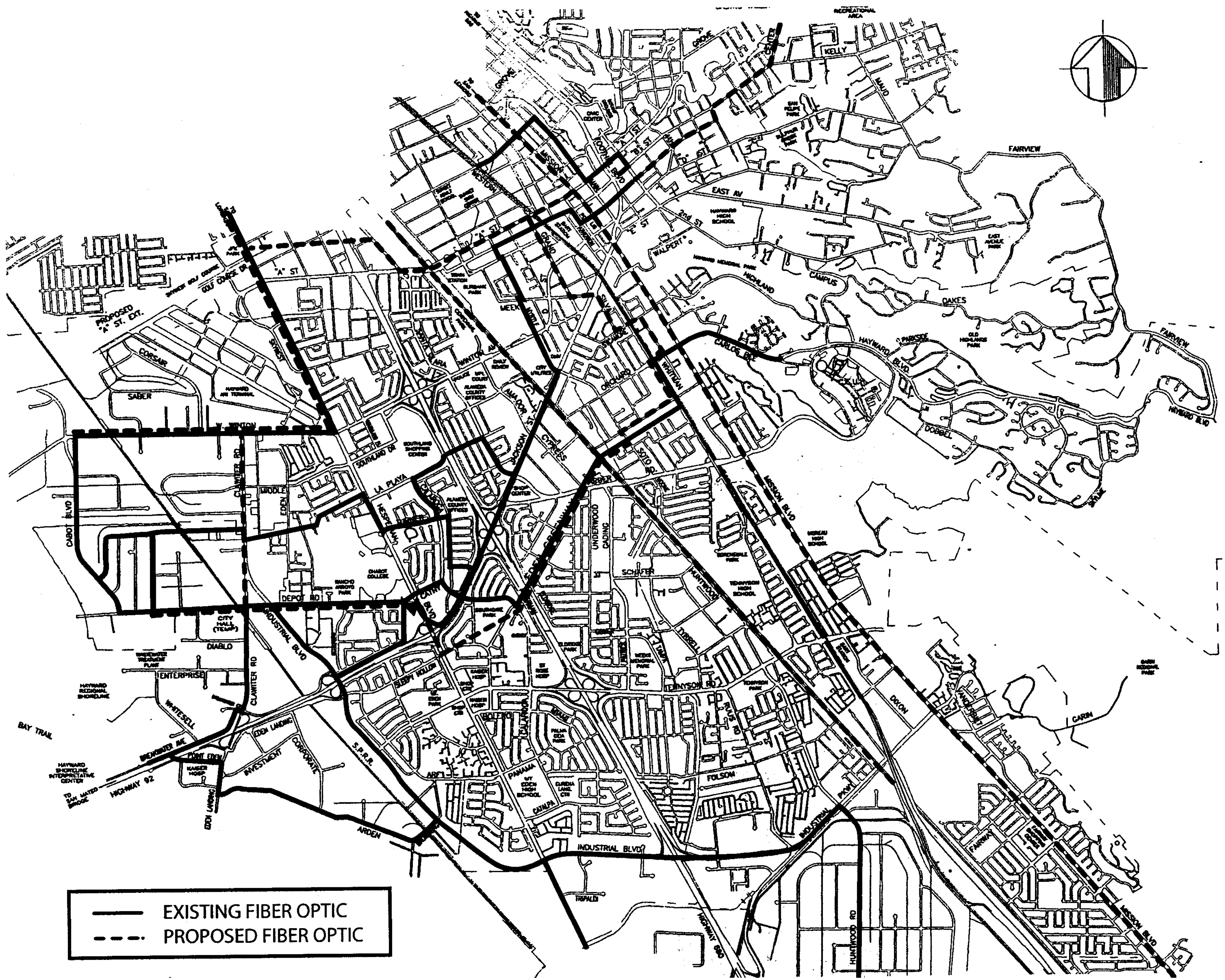
Industrial Corridor Sub-Area	Public Utility	Airport Industrial	Airport Commercial	Other Airport	Other Public Agency	Total
West	91.2	189.8	8.9	117.2	138.5	**545.5**
Southwest	0.0				65.6	**65.6**
South	39.3				89.0	**128.4**
Total	**130.5**	**189.8**	**8.9**	**117.2**	**293.1**	**739.6**

Existing Vacant Land by Industrial Corridor Sub-Area (Acres) and Number of Parcels

Industrial Corridor Sub-Area	Number of Parcel (0.1-4.9 Acres)	Total Acres (0.1 4.9 Acre Parcels)	Number of Parcels (5.0-9.9 Acres)	Total Acres (5.0-9.9 Acre Parcels)	Number of Parcels 10+ Acres	Total Acres (10+ Acre Parcels)
West	50	60.2	2	11.9	4	58.2
Southwest	38	45.2	2	13.2	3	146.7
South	25	35.2	5	32.2	0	0.0
Total	**113**	**140.6**	**9**	**57.3**	**7**	**205.0**

City of Hayward: February 13, 2001
Source: City of Hayward GIS and Metroscan

EXHIBIT E


EXISTING FIBER OPTIC
PROPOSED FIBER OPTIC
FAIRVIEW
EAST AV
CAMPUS
OAKES
HAYWARD BLVD
MISSION BLVD
CARLOS BEE
HIGHLAND
WHITMAN
CYPRESS
JACKSON ST.
AMADOR ST
WINTON AV
W. WINTON
CLAWITER RD
CABOT BLVD
CORSAIR
SABER
MIDDLE
EDEN
LA PLAYA
SOUTHLAND DR
HESPERIAN
DEPOT RD
CATHY BLVD
INDUSTRIAL BLVD
DIABLO
ENTERPRISE
WHITESELL
BREAKWATER AVE
POINT EDEN
EDEN LANDING
INVESTMENT
CORPORATE
S.P.R.R.
ARDEN
HIGHWAY 92
BAY TRAIL
SCHAFER
HUNTWOOD
TYRRELL
TENNYSON RD
FOLSOM
PANAMA
CATALPA
TRIPALDI
HIGHWAY 880
HUNTWOOD RD
INDUSTRIAL PKWY
DIXON
CARIN
FAIRWAY
"A" ST
PROPOSED "A" ST. EXT.
GOLF COURSE DR
KELLY
MAIN
GROVE
2nd ST
WALPERT
ORCHARD
UNDERWOOD
DOBBEL
PARKSIDE
KAISER HOSP
CHABOT COLLEGE
CITY HALL (TEMP)
HAYWARD REGIONAL SHORELINE
HAYWARD SHORELINE INTERPRETIVE CENTER
TO SAN MATEO BRIDGE